

Connections | December 2021

Managing your personal wealth isn't just about the dollars and cents. It's about connecting with what matters to you. Across all generations from life changes through life stages, Mesirow is here to help. That's why every quarter we write content on topics that we hope are relevant and insightful for you.

[Seven year-end tax planning tips](#)

It is always important to review your financial plan every year, but based on the events of 2020-2021, it may be more important than ever to review your plan to see if there are opportunities to make any changes based on any life changes you or your family may have experienced during the pandemic. Depending on your unique situation, some of the tips listed below might make sense for you and your family. [more >](#)

[Long-term care is a reality for most. Here's how you can be ready](#)

Seventy percent of people turning age 65 will need some type of severe long-term services and support in their lifetime. The goal is to be prepared so, if you turn out to be one of them, it doesn't derail your overall financial plan. [more >](#)

[What to expect "financially" when you're expecting](#)

Having a baby is one of the most exhilarating and awe-inspiring moments in most people's lives, truly a time of profound emotion and personal joy. However, that joy also comes with additional financial complexities that can be dealt with by planning ahead. [more >](#)

[Now, more than ever, having a formal estate plan is critical](#)

The past couple years have had a sobering effect on many of us. They have brought us to the realization that, regardless of our age or stage in life, we may not always have the luxury of as much time as we once thought. Many individuals have traditionally focused on their estate planning later in life, but with the pandemic, it has become more important than ever to ensure that your assets and investments are organized, titled correctly and formalized with an estate attorney. [more >](#)

Tools you can use

[Tax planning guide](#)

We have also included a link to the recently announced [2022 contribution limits](#).

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